

## What type of phone call is being made or received?

TYPE OF COMMUNICATION	<b>Outreach Call</b> if this is an outbound call being made for the purpose of a referral. <ul style="list-style-type: none"> <li><b>Outreach Call – Answered</b> should be used if a referral call is answered.</li> <li><b>Outreach Call – Left Voicemail</b> should be used if a referral call is made but not answered, and a voicemail has been left.</li> </ul>	EXAMPLE	Calling a contact to let them know about a vaccine event.
	<b>Monitoring Call</b> if this is a referral made as part of a standard initial or daily monitoring call (inbound or outbound).	EXAMPLE	Contact notes a resource need during initial assessment conversation, and you refer them to support.
	<b>Incoming Request</b> if this is an inbound call from a contact or case being made for the purpose of receiving a referral.	EXAMPLE	Contact calls seeking information about food assistance.

## What was the context of the referral?

TYPE OF CAMPAIGN	<b>Awareness</b> if you are providing general support information that is not connected to a specific event or request. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Providing education to a contact about vaccine availability in their area.
	<b>Specific Event</b> if you are providing this individual with information about an upcoming event. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Calling a contact to let them know about an upcoming vaccination event in their area.
	<b>Specific Request</b> if this individual requests information about a specific need. <i>(Typically a Monitoring Call or an Incoming Request.)</i>	EXAMPLE	On a monitoring call, a contact lets you know they need assistance with housing.

## What type of referral is being made?

KIND OF REFERRAL?

OUTCOME OF THE REFERRAL?

VACCINE	
REFERRAL TYPE	<b>Vaccine</b> if the referral is for vaccination support. <i>This referral should be logged for all contacts and case patients who have not already been referred.</i>
OUTCOME OF REFERRAL	<ul style="list-style-type: none"> <li>Vaccine scheduled</li> <li>Already vaccinated</li> <li>Does not meet criteria for vaccine</li> <li>Does not want vaccine</li> <li>Transferred to LHD or vaccine hotline</li> <li>General information provided</li> <li>Other <i>(will produce a free text field)</i></li> </ul>

RESOURCE	
REFERRAL TYPE	<b>Resource</b> if the referral is for another resource need, such as food assistance, legal help, or transportation. <i>This referral should be logged if the contact responds “Yes” to resource need inquiries.</i>
REFERRAL NEED	Use this multi-select field to select one or more descriptors for this resource need. <i>(Selecting “Other” will produce <b>Referral Need – Other</b>, a free text field to gather more information.)</i>
OUTCOME OF REFERRAL	<ul style="list-style-type: none"> <li>Confirmed needs met</li> <li>Connected with CHW (if applicable)</li> <li>Pending Action <i>(if the outcome of this referral is yet to be confirmed)</i></li> <li>Resource Not Available <i>(if the resource needs are unable to be met)</i></li> <li>Other <i>(will produce a free text field)</i></li> </ul>
AGENCY	<i>The organization to which you have referred this individual:</i> <ul style="list-style-type: none"> <li>211</li> <li>CHW</li> <li>Local resource</li> <li>Other <i>(will produce a free text field)</i></li> </ul>
AGENT NAME	Free text field for the name of the person to whom you referred this individual.
HOW REFERRED	<i>The process used for this referral:</i> <ul style="list-style-type: none"> <li>Transferred to person (warm transfer)</li> <li>Transferred to phone number (cold transfer)</li> <li>Provided contact information (no transfer)</li> <li>Other <i>(will produce a free text field)</i></li> </ul>

OTHER	
REFERRAL TYPE	<b>Other</b> if the referral cannot be captured by “Vaccine” or any of the categories listed in “Resource.”
REFERRAL TYPE DESCRIPTION	Use the free-text field to add more information about this referral.
OUTCOME OF REFERRAL - OTHER	Free text field for you to provide information.
NOTES FROM REFERRAL	Required free text field for you to provide information.

DON'T FORGET: A referral does not take the place of a phone call logged in Timeline/Activities. You must log BOTH a phone call record and a referral record!